

Account access authentication

The step-by-step process

Important first step

- Setting up your custody account access is vital and needs to be completed prior to your migration.
- We'll monitor the authentication progress. If you've not authenticated, your Relationship Manager will reach out to you based on the contact information we have on file.

Security Operations Center

- 130 full-time security staff
- Staffed 24/7/365
- Monitors our network and infrastructure

Your account activation process will be monitored by this team.

Multiple roles with
Principal[®]

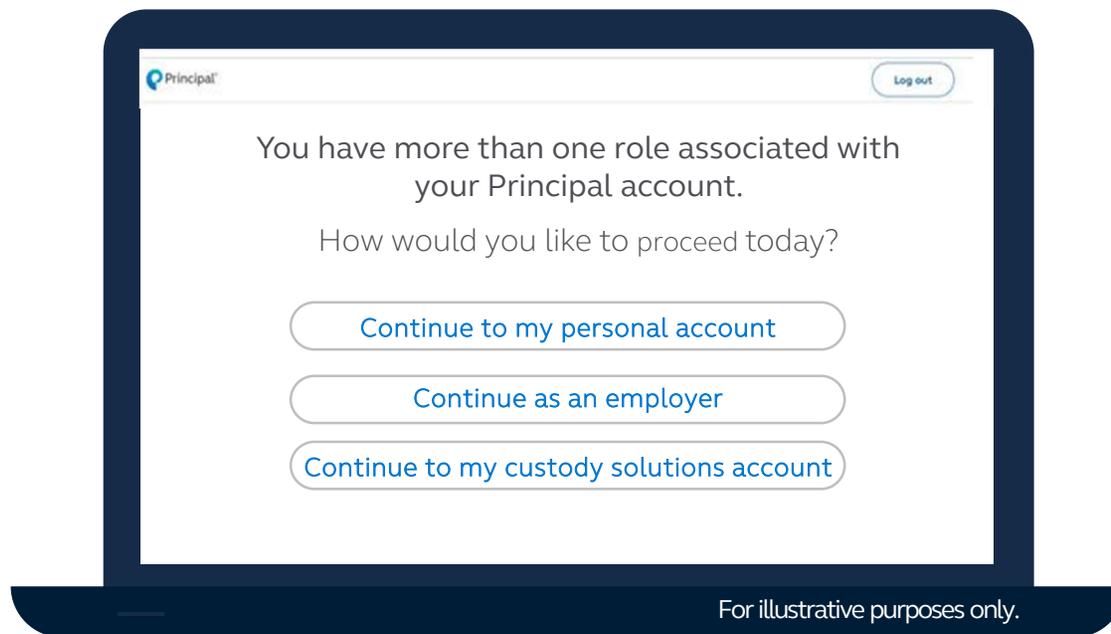
Multiple roles with Principal[®] accounts

- If you already have another role associated with Principal (tied to another product), you'll use the **same username and password** that you use today.
- This means **one single username and password** for all your Principal web experiences.

Important

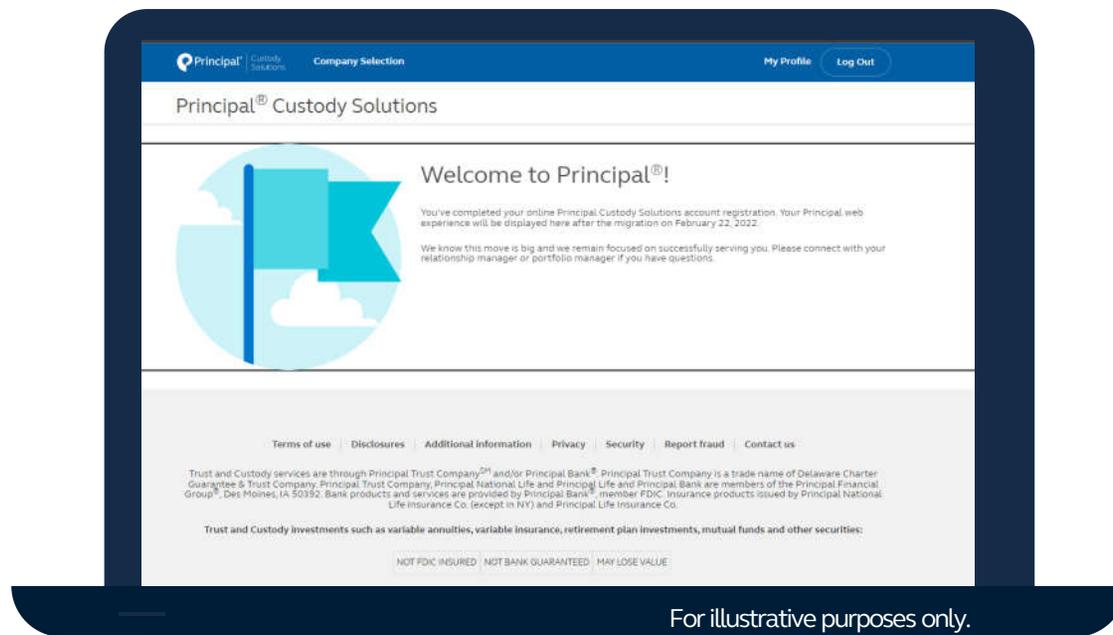
To reset your username and/or password, call 1-877-475-3436, option 1.

I have a Principal[®] username and password



Starting Jan. 18, when you log in with your Principal username and password you use today, you'll simply see the custody solutions account role option, in addition to your existing login roles/products.

I have a Principal[®] username and password



If you select the custody solutions account prior to migration, this is the screen you'll see.

Your custody solutions account data doesn't migrate to Principal[®] Custody Solutions until Feb. 22 so there is no data for you to view.

Email addresses and login

Principal matches existing accounts by email address

One email address

If you use one email address for your trust and custody account(s), as well as your other Principal product(s),

- you don't need to go through the online account access process.

Multiple email addresses

If you use multiple email addresses, one for your trust and custody account(s) and a different one for your other Principal product(s),

- you will need to go through the online account access process.

Take note: sharing a username and password

Sharing username and password

If you currently share a username and password with a team member(s),

contact your Relationship Manager to get set up to receive your own online account authentication email.

Step by step process

Getting started

- Watch for an [email from Principal on Jan. 18](#). If you don't receive the Jan. 18 email, reach out to your Relationship Manager.
- [If you've not authenticated](#), your Relationship Manager will reach out to you (based on the contact information we have on file).
- We're migrating the account access you currently have, so when you log in on Feb. 22, you'll have [access to the same accounts, features, and functions you do today](#).

Account set-up email from Principal

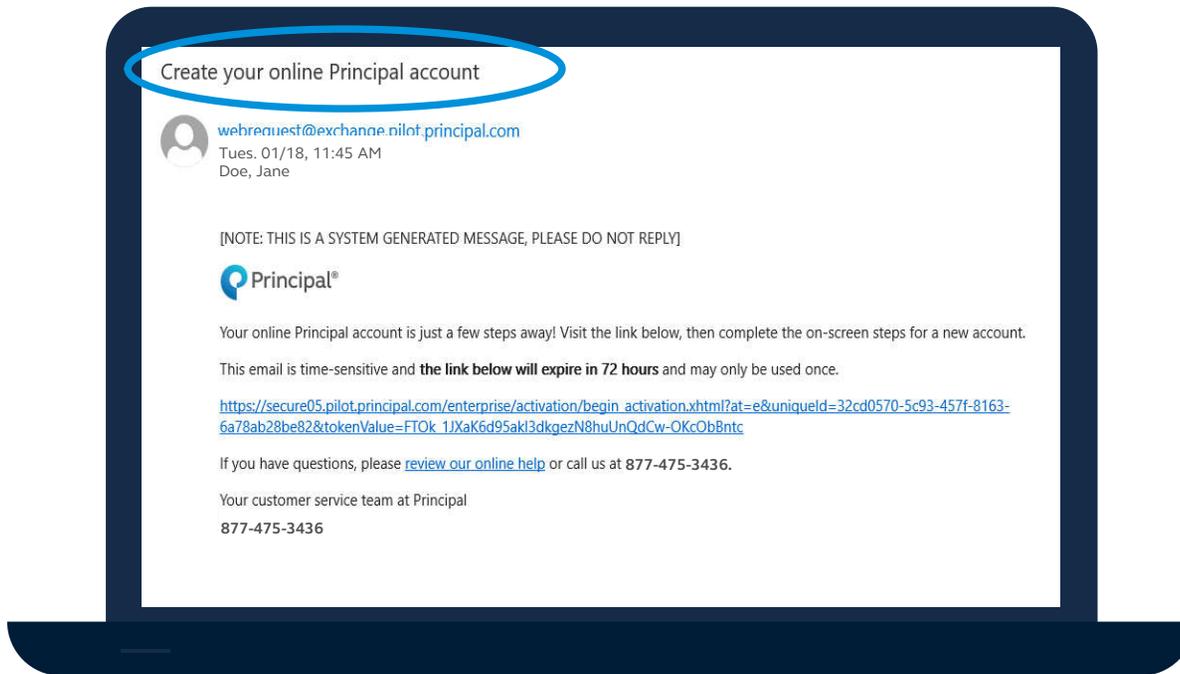


The account set-up email will come from one of the following email addresses:

webrequest@exchange.principal.com

theprincipalfinancialgroup@exchange.principal.com

Account set-up email



We recommend using a computer, rather than a mobile device to activate your account.

- The link is specific to you and your account set-up.
- Click on the link within 72 hours to begin the account set up process.
- If you click on the link after the 72-hour window, you'll receive a message indicating Principal will reset the process by sending you a new email within a few days.
- Call 877-475-3436 for help, option 1, then option 2 for Principal® Custody Solutions' assistance.

For illustrative purposes only.

Set your username and password



Set Your Username and Password

Your username must be 8-32 characters, include at least 2 numbers, and no special characters or spaces.

Username

Your password must be 8-32 characters, include at least 1 number, 1 letter, and no spaces. It can't be the same as your username, and it is case sensitive.

Password

Confirm Password

Key requirements for your username and password.

- Username
 - 8-32 characters
 - At least 2 numbers
 - No special characters/spaces
- Password
 - 8-32 characters
 - Must have 1 number, 1 letter, and no spaces
 - Case sensitive
 - Can't be the same as your username

For illustrative purposes only.

Set your customer service questions



Set Your Customer Service Questions

Your Customer Service security questions and answer are an additional security measure we use to help protect account information.

Question 1

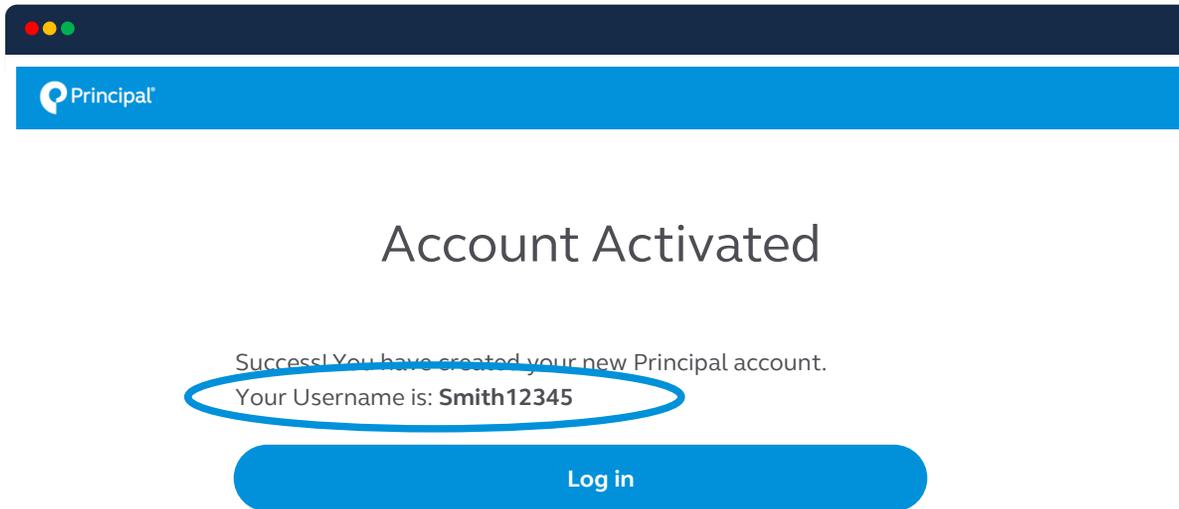
Question 2

Question 3

- An additional security measure to help protect your trust and custody account information.
- Three default questions
 - What was your high school mascot?
 - What street did you grow up on?
 - What was the model of your first car?
- After the account has migrated, you can change the security questions.

For illustrative purposes only.

Your account activated



- Once the questions are answered, you'll receive confirmation that your account has been set up.
- The username you created earlier will display on this screen.

For illustrative purposes only.

Last step: two-factor authentication (required)

Last step: two-factor authentication



Set up 2-factor authentication

Choose **one or more** of the following options

<input type="checkbox"/> Set up an authenticator app (most secure)	?What's this?
<input type="checkbox"/> Set up text messaging	
<input type="checkbox"/> Set up voice call	

Continue

Choose your preferred method of receiving two-factor authentication:

- Authenticator app
- Text message
- Voice call

For text messaging and voice call, follow the prompts you receive.

For illustrative purposes only.

1 Set up an authenticator app



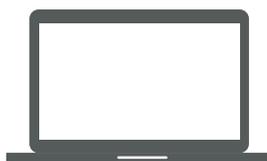
Set up an authenticator app

Step 1 of 2

Download an authenticator app, or open one if you already have it. The following apps are compatible with Principal—but others might work as well.



Available for mobile:
Microsoft Authenticator
Google Authenticator
Authy
LastPass Authenticator



Available for desktop:
Authy

Go back

Continue

The next steps walk through using an authenticator app.

Step 1

Download an authenticator app for either your mobile device or your desktop. If you already use one, open it.

For mobile applications, we've found that Microsoft, Google, Authy, and LastPass authenticators are compatible with Principal, but others might work as well.

For desktop applications, use Authy.

For illustrative purposes only.

2 Enter the code



Set up an authenticator app

Step 2 of 2

Follow the setup instructions on your app. When prompted, scan the image below or enter the 16-digit code.



ZCCR 3RUI IWPP LXXA

If you're using an app on a desktop computer, you'll need to manually enter the code above

Go back

Continue

Step 2

From your desktop, manually enter the 16-digit code shown.

OR

From your mobile device, scan the QR image.

For illustrative purposes only.

3 Confirm your authenticator app – Principal code



Let's confirm your authenticator app

Open the app to find your Principal code

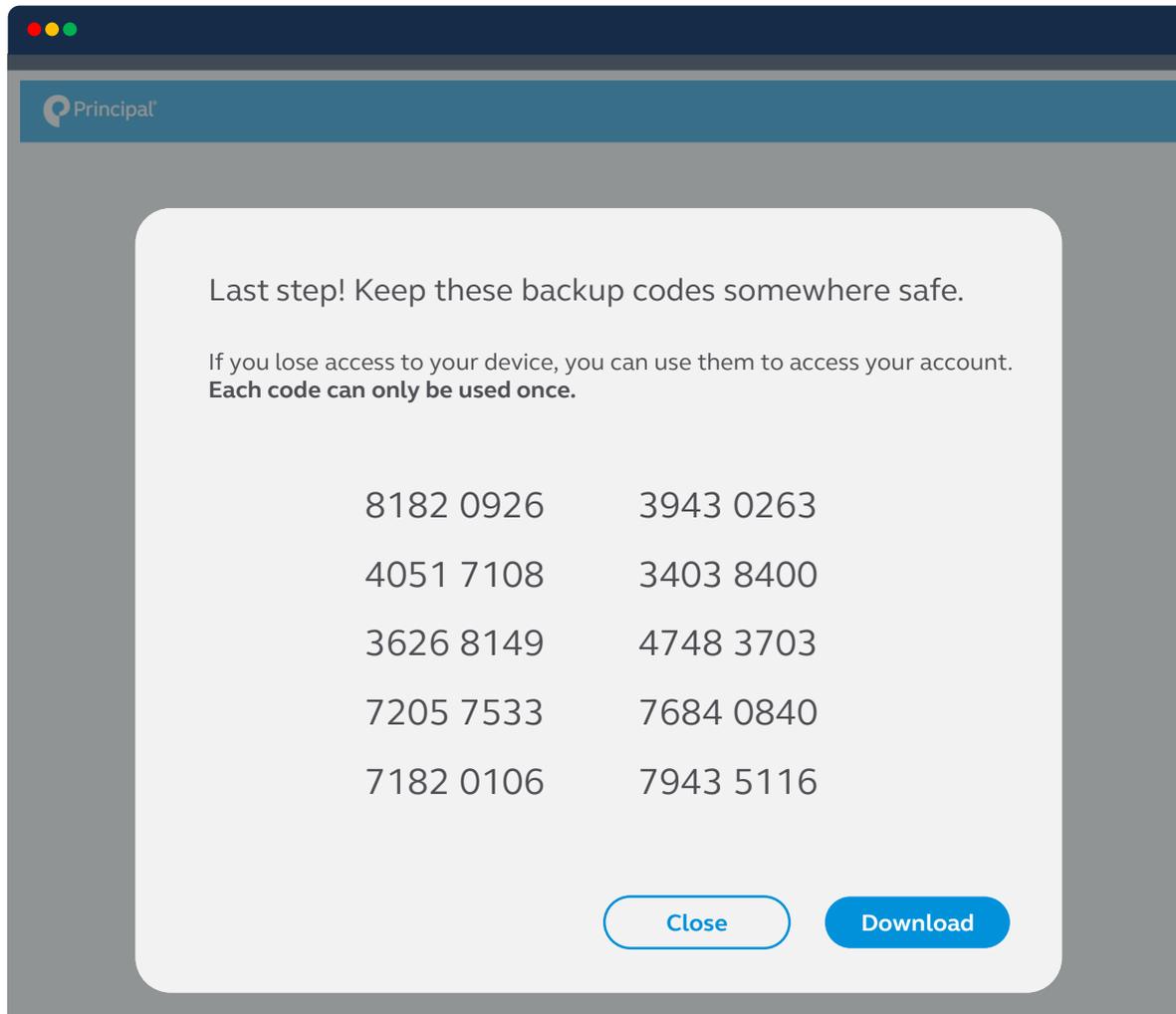
Go back

Continue

Step 3
Confirm your authenticator app by opening the app to find your Principal code.

For illustrative purposes only.

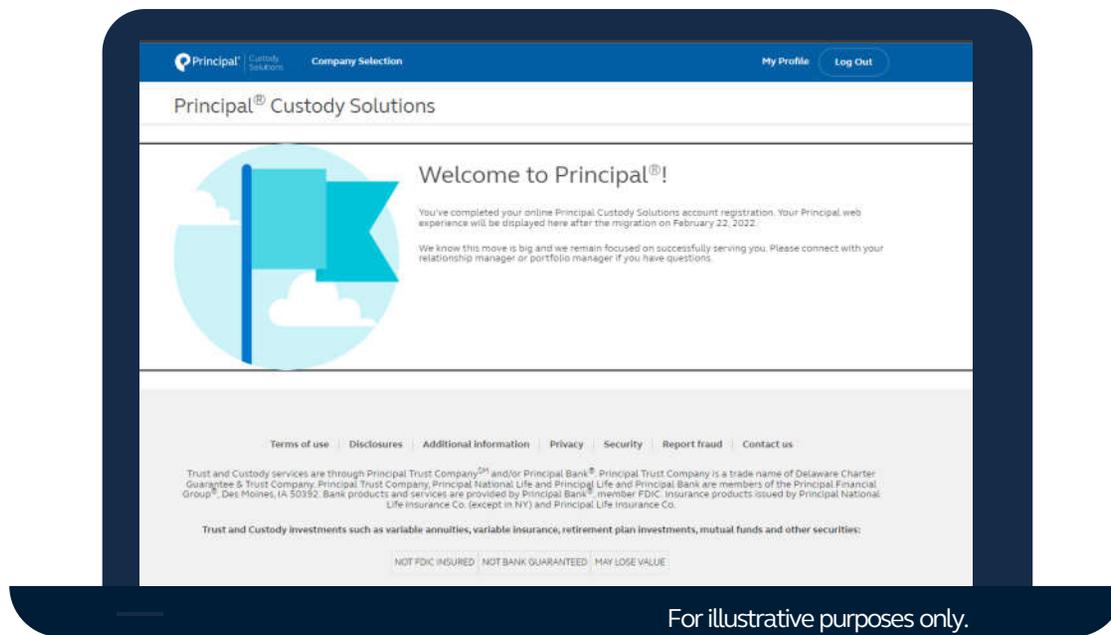
4 Back-up codes



- You'll receive a list of 10 backup codes to use if you lose access to your device, such as losing your cell phone.
- Store these codes somewhere safe.
- If you lose these codes, call us at 1-877-475-3436, option 1.
- You will no longer need your key fob to access your account.

For illustrative purposes only.

Account set-up complete



Once you've completed the steps, the account set-up process is complete, and you'll be redirected to this welcome page.

As a reminder, your custody solutions account data doesn't migrate to Principal® Custody Solutions until Feb. 22 so there is no data for you to view.

If you find you need help during this process, please call 1-877-475-3436, option 1, then option 2 for Principal® Custody Solutions' assistance or reach out to your Relationship Manager.

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